

Subj: COAST GUARD TUITION ASSISTANCE (TA) PROGRAM

Ref- (a) Training and Education Manual, COMDTINST M1500.10B
(b) Coast Guard Institute Publication 10460/1560B

1. PURPOSE. This Instruction establishes policy and procedures for the management and execution of the Coast Guard Tuition Assistance Program.
2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of headquarters units, assistant commandants for directorates, Chief Counsel, and chiefs of special staff offices at Headquarters shall ensure compliance with this Instruction.
3. DIRECTIVES AFFECTED. Any policy and guidelines concerning TA in references (a) and (b) are hereby superceded.
4. DISCUSSION. The Coast Guard TA program is designed to assist eligible personnel in their professional development by providing funding for off-duty voluntary education courses to broaden their academic or technical background. Tuition assistance is not intended to be used to meet unit specific operational training requirements. The management of the TA program was centralized at the USCG Institute in December 1997. It is supported by a consolidated tuition assistance processing system managed by the Naval Education and Training Professional Development and Technology Center (NETPDTC). The USCG Institute approves the TA and issues a TA Authorization Form (CGI Form 1560, enclosure (1)). The applicant provides the TA Authorization Form to the academic institution during registration and the institution, in turn, invoices (NETPDTC) for payment. (NETPDTC) also manages the TA computer database, posting of grades, and makes payment to the academic institutions. A flow chart of the TA process is provided as, enclosure (2). Eligibility and benefits are standardized service-wide for active duty, appropriated civilian employees and reserve members of team Coast Guard. Tuition assistance shall be paid up-front for coursework that follows the traditional semester time period

(less than 18 weeks). Courses that are longer than 18 weeks in length such as web-based, correspondence or other distance education programs, will be reimbursed upon successful completion by the member. All courses shall be related to Coast Guard missions or to the individual's career and professional development.

5. ELIGIBILITY.

- a. Enlisted members must have 12 months remaining on their active duty contracts or Selected Reserve obligation upon completion of the course. Members may execute an extension or reenlistment to meet the minimum service obligation. Members affected by High Year Tenure (HYT) are exempt from this requirement and will provide documentation of HYT when submitting TA requests.
- b. Officers must agree not to request release, separation, retirement or termination of selected reserve status for 12 months after completing a course.
- c. Civilian employees must have at least 12 months of prior, continuous Government service to be eligible for TA and agree to retain employment with the federal government for 12 months after completing the course.

6. TUITION.

- a. Tuition for approved high school completion programs shall be fully funded for personnel who have not been awarded a high school or equivalency diploma.
- b. College courses (graduate or undergraduate) shall be paid at 75 percent of the cost of an institution's tuition for each course. The maximum payable per semester hour is \$187.50, or \$125 per quarter hour. The maximum amount payable per individual per year is set annually by Commandant (G-WT) for active duty personnel, civilian employees and reserve personnel (reservists who are on extended active duty shall be eligible for the active duty cap if one year of obligated service remains on their contract upon completion of the course).
- c. Vocational Technical programs are terminal degrees or certificate programs that prepare individuals for specific occupational specialties. Credits earned through vocational technical programs will generally not transfer to collegiate degree programs. Courses measured in semester hours or quarter hours are subject to the same cap as collegiate courses. Some vocational technical courses are measured in clock hours. The maximum TA payable per clock hour is currently \$12.50. This correlates to the semester hour cap in paragraph 6.b..
- d. Direct expenses for instruction such as laboratory, studio, shop fees and supplies may be included in the computation of education expenses covered by the 75 percent limitation for off-duty education provided these costs are based on specific fees or charges customarily levied by educational institutions and directly tied to the course for which the fee is required. Reimbursement of expenses authorized by this subparagraph is intended to cover costs incurred for use of equipment and for consumable supplies, which will be expended over the duration of the course. It 11 not cover the cost of tools, protective or other equipment, manuals, or textbooks that become the property of the student. In cases where flat fees are charged which include nonconsumable items, the institution must furnish an internal cost breakdown of the total cost of the course. Only that portion of the fee that meets the use and consumable criteria will be eligible for TA

reimbursement. Examples of fees not authorized for TA are: entrance or enrollment fees (unless these fees are identified by the school as "fees in lieu of tuition"); record maintenance fees; student activity fees; course registration fees; textbooks; nonconsumable materials; assembled items available commercially such as computers, televisions, robots and fees for flight time, flying lessons, or noncredit aviation classes.

- e. Developmental courses may be authorized if required by the institution prior to taking a freshman level course. Many colleges require a developmental course in Math, English and reading if the applicant has been out of school for several years. Applicants shall be informed that these courses are not transferable.
- f. The established maximums for tuition assistance are subject to annual funding. Budget allocations may cause further adjustments to annual funding levels

7. LIMITATIONS.

TA shall not be authorized for:

- (1) any course for which the applicant is receiving assistance under any other Federally funded program where such a payment would constitute a duplication of benefits from the Federal Treasury. In cases where Federal grant monies are credited to the institutional student's accounts, the credited portion may not be calculated in the TA application. The TA will be calculated after grants, scholarships, fellowships have been subtracted from the cost of tuition. The only exception is the application of Pell Grants. The Pell Grants are needs based and therefore may be used by the student to defray any educational related expense. For example, if the sum of allowable TA plus a Pell Grant exceeds the tuition and related instructional cost, then the TA should be applied first and the Pell Grant should be used for books, supplies, and fees. If Pell Grant funds remain after these expenditures, then those funds may be available for childcare and transportation in accordance with the terms of the Federal Pell Grant Program
- (2) audited courses.
- (3) funds obligated across fiscal years. Separate applications must be submitted for courses beginning in different fiscal years. The class starting date determines the fiscal year to be used (except for distance learning courses).
- (4) courses previously completed (where a grade "D" or better was received).
- (5) physical education and or recreation courses unless these courses are required by the institution for degree completion or the applicant is a candidate for a degree with a major in physical education or recreation.
- (6) applicants in a duty-under-instruction status where the applicant's educational fees are being paid through another Coast Guard program
- (7) undergraduate students whose average GPA is less than 2.0 (on a 4.0 scale) on the previous 12 semester hours completed under TA.
- (8) graduate students whose academic average on the previous 12 semester hours or equivalent taken under TA is less than a grade of **"B"**.

- (9) a second degree at the same educational level (i.e., if the applicant already has an associate's degree, TA shall not be authorized for another associate's). Exceptions shall be authorized when the second degree is clearly related to the individual's rate and the USCG mission.
- (10) courses resulting in continuing education units (CEUs).
- (11) applicants who are receiving TA from another military service when assigned to that installation for duty would not be eligible to receive TA through the Coast Guard s simultaneously.

8. ACCREDITATION AND SCHOOL SELECTION.

- a. Accreditation is a nongovernmental process that gives public recognition to institutions that meet certain published standards of academic and administrative quality. Accreditation helps assure the public about the quality of the institution. Accrediting agencies are recognized by the U. S. Department of Education to accredit on-campus and distance learning programs found at the high school, associate, baccalaureate, masters and doctorate level. When selecting an academic institution, ensure proper accreditation by referring to institutions recognized in the United States by either the National, Regional or Professional Institutional Bodies. If an institution is not accredited by one of these bodies, the course is not eligible for TA. To confirm accreditation of a college, Education Services Officers (ESOS) are strongly encouraged to contact either the registrar or dean of admissions at the institution.
- b. Courses may be taken in resident at a local college or university or via distance education. It is preferred that the Continental United States (CONUS) institutions have regional accreditation for collegiate work as regional accreditation provides for greater transferability of credits. The majority (over 4,500) of institutions in the United States are regionally accredited.
- c. Distance education courses will be accredited by the Distance Education and Training Council (DETC) and listed in *The DANTES Catalog of Nationally Accredited Distance Learning Programs* or *The DANTES Independent Study Catalog*.
- d. Vocational/technical courses will be rate-related and approved by the national recognized accrediting commission.
- e. VOTEC and DETEC courses are not required to lead to a college degree to be eligible for tuition assistance. Courses accredited by DETEC and listed within the Defense Activity for Non-Traditional Education Support (DANTES) catalogue are the only vocational technical distance learning courses authorized for tuition assistance.
- f A list of schools used most frequently is distributed annually to command Education Services Officers (ESOs) by the USCG Institute.

9. APPLICATION PROCEDURES.

- a. TA is intended as an advance to help defray out-of-pocket tuition expenses. Requests for TA must be submitted and approved before class registration deadline.

- b. Specific application procedures and a copy of the Application for Off-Duty Assistance (CG Form 4147) are included in enclosure (3).
- c. Applicants are responsible for prompt submission (at least ten working days before the date required by the school) of a properly completed Application for Off-Duty Assistance Form (CG Form 4147).
- d. Prior to signing the form, applicants shall read page two, it contains the *Statement of Agreement/Understanding* in which the applicant agrees to follow the established guidelines and to repay the money if the course is not satisfactorily completed.
- e. All applicants are advised that until they are in receipt of a properly signed TA Authorization Form (CGI Form 1560, enclosure (1)), approval of TA cannot be assumed.
- f. Reimbursement will only be authorized for distance learning courses requiring 18 weeks or longer to complete, or in unique situations where mission requirements preclude submission of the application prior to course convening.
- g. Command approval to enroll in off-duty education courses is required to use TA and is validated by the signature of the Commanding Officer (CO), ESO or designee in block 13 of the TA application. The signature in block 13 signifies that the course meet the requirements contained in this instruction and shall normally be completed by the ESO.
- h. The command ESO is responsible for interfacing with the USCG Institute and the academic institution. Applicants are encouraged to consult with their ESO for help in locating an accredited program suited to their interests that will allow attainment of their personal and professional goals.
- i. Properly completed forms will be faxed to the CG Institute at (405) 954-7249. The fax machine is automatic and available 24 hours a day
- j. Checklists for use by applicants (enclosure 4) and ESOs (enclosure 5) are provided as assistance in completing the tuition assistance process.

10. REGISTRATION AND THE TA AUTHORIZATION FORM.

- a. The CG Institute issues the TA Authorization Form (enclosure 1) to the applicant when the course is authorized. The applicant takes this form to the institution at the time of registration.
- b. Applicants frequently find that the course in which they wish to enroll is fall cancelled, or otherwise not available at the time of registration. The member may select an alternate course.

(1) If the cost of the course is the same or less than the authorized course, the applicant annotates the correct information (Department Code, Course Number, Title, and cost), submits the original to the academic institution, and mails a copy of the annotated authorization form to the address on the bottom of the form (NETPDTC).

(2) If the cost of the course increases the applicant annotates the correct information on the form and faxes the form to the CG Institute for reauthorization. The changes will be entered and a new authorization form issued to the applicant.

- c. The academic institution accepts the TA Authorization Form and invoices the address on the form for payment. Institutional representatives with questions concerning payment may call the USCG Liaison at NETPTDC at (850) 452-1182/1293. Applicants shall not submit invoices they have received from the institution to NETPTDC for payment. In this situation, the ESO shall intervene with the institution and advise school officials of the process for invoicing for payment.
- d. To withdrawal from the course after applicants start a class there is a time frame established by the institution (usually the first week or so) where the student can withdraw from the class without penalty. Students who officially withdraw through the institution's registrar will receive a refund of the monies paid for the class and the USCG will not be billed for the class. In this case, applicants will mark "CANCEL" on the TA Authorization Form and mail the form to the Navy at the address on the bottom of the form Applicants who do not take the responsibility of officially withdrawing and earn a "F" will be required to repay the government.

11. REIMBURSEMENT.

- a. Distance education courses where the institution allows the applicant more than 18 weeks to complete the course will be reimbursed after the member successfully completes the course. Applications, which are not filed in the 90-day after the course completion will not be considered for reimbursement. To apply for reimbursement, applicants shall submit the following paperwork:
 - (1) CG Form 4147
 - (2) copy of grade report
 - (3) copy of receipt showing fees paid by applicant
 - (4) an extract from the institution's catalog listing tuition charges
 - (5) address where the check is to be mailed
- b. Distance education courses where the institution requires course completion in 18 weeks or less shall be paid prior to the class convening. Documentation from the institution is required and shall be submitted with CG Form 4147.
- c. In situations where applicants are unable to submit their TA request prior to starting class, the applicant may apply for reimbursement. The applicant shall submit a letter to the CG Institute via their Commanding Officer requesting reimbursement and stating the reasons for the waiver request. A strong endorsement from the Commanding Officer will be required for consideration (the endorsement shall not be signed by the ESO except in those situations where the CO is the ESO). The only situation in which a waiver will be automatically authorized is when it is clearly documented that the applicant's command or unit was involved in an operational mission which precluded a normal submission. In addition to the written request and command endorsement, applicants will submit the paperwork identified in paragraph 11.a. In any situation, applications must be submitted within 90 days after course completion. Incomplete applications will be returned unprocessed and will not provide grounds to waive the 90 days submission requirement

12. GRADES AND CERTIFICATES.

- a. The final part of the process is to submit the grade reports to the USCG Liaison at NETPTDC for entry into the database. The grade report will be mailed to the:
Commanding Officer
NETPDTC N8115 (USCG Group)
6490 Saufley Field Road
Pensacola, FL 32509-5241

(Grade reports should not be faxed as fax copies may not be legible.) The institution may report the grades but the applicant is ultimately responsible for ensuring the grades are submitted.

- b. Grades shall be reported not later than 60 days after the course ending date. When grades are not reported, the applicant will be locked out of the TA system until the grades are received.
 - (1) If the grades are not posted within 60 days of course completion, NETPDTC will send a letter to the applicant.
 - (2) If the grades are not received within 90 days of course completion, NETPDTC will send a letter to the applicant's commanding officer.
 - (3) If the grades are not posted within 120 days, collection actions will be initiated in accordance with the USCG Pay and Personnel Procedures Manual.
- c. Individuals who receive an incomplete ("I") in a course shall have six months from term end date to finish course requirements and receive a passing grade.
- d. In cases where the applicant does not complete the class or receives a failing grade the member shall repay the amount paid by the USCG as soon as possible and not later than 60 days after the course completion date

13. TA RESOLUTION.

- a. Applicants shall resolve their indebtedness to the government as soon as possible. Monies that are repaid are returned to the USCG account and reallocated. The check or money order shall be payable to the US Treasury and mailed to the address in 12.a. The Tuition Assistance Resolution/Indebtedness Response Letter used for this purpose is (enclosure 6).
- b. An individual who is discharged prior to completing the one year service obligation shall repay all costs incurred by the Coast Guard with the exception of those individuals who:
 - (1) are involuntarily discharged for reason of Convenience of the Government in connection with a reduction in force.
 - (2) are separated or retired by reason of physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct; or hardship discharged.

14. RESOURCES.
- a. USCG Institute
 - (1) CG Institute's Program Manager for TA - (405) 954-7236. ESOs should call to clarify policy issues.
 - (2) CG TA Hotline - 1-(888) 532-8257 (888-53-bucks). Members may call to resolve problems.
 - (3) CG Institute's Fax number - (405) 954-7249.
 - (4) CG Institute homepage on standard workstation III: <http://www.uscg.mil/hq/cgi>.
 - b. USCG/Navy Liaison
 - (1) ESOs institutional representatives may call (850) 452-1293 concerning payment to Institutions. ESOs students may call concerning receipt of grades.
 - (2) USCG/Navy Liaison's Fax number - (850) 452-1149. Do not fax grade reports if content is lightly printed or otherwise unclear.
- (3) Mailing address:
Commanding Officer
NETPDTC N81.15 (USCG Group)
6490 Saufley Field Road
Pensacola FL 32509-5241
15. FORMS AVAILABILITY. Coast Guard Institute Form, CGI Form 1560, TA Authorization Form and Coast Guard Form, CG Form 4147, Application for Off-Duty Assistance, are available from the US Coast Guard Institute. The Coast Guard Form, CG Form 4147, Application for Off-Duty Assistance, is also available in JetForm Filler on SWIII, and from the Information Management (G-SII) homepage, eee.uscg.mil/hq/g-s/g-si/g-sii/sii.htm.

RD SIROIS
Director of Reserve and Training

- Encl: (1) *TA Authorization Form*, CGI Form 1560
(2) Flow Chart of TA Process
(3) *Application for Off-Duty Assistance*, CG Form 4147
(4) TA Checklist - Applicant
(5) TA Checklist - ESO
(6) Tuition Assistance Resolution/Indebtedness Response Letter

CGI FORM 1560 (10/97)

TUITION ASSISTANCE AUTHORIZATION

SSN: _____ NAME: _____

SCHOOL CODE: 1516A INSTITUTION: ST PETERSBURG JUNIOR COLLEGE

ENROLLMENT INFORMATION

TERM DATES: START: 12-MAY-99 END: 21-JUN-99

COURSE	TITLE	HOURS	GOV SHARE	STU SHARE
PHI 1603	APPLIED ETHICS	2	\$68.76	\$22.92
PSY 1012	PSYCHOLOGY	3	\$103.14	\$34.38
TOTAL		5	\$171.90	\$57.30

I hereby authorize release of my grades to the US Navy. I understand it is my responsibility to ensure grades are submitted and non-receipt of grades will prohibit additional tuition assistance.

Applicant's Signature

Phone

CGI 199902287 03-MAY99
AUTHORIZATION NUMBER DATE AUTHORIZE SIGNATURE OF USCG PROGRAM MANAGER

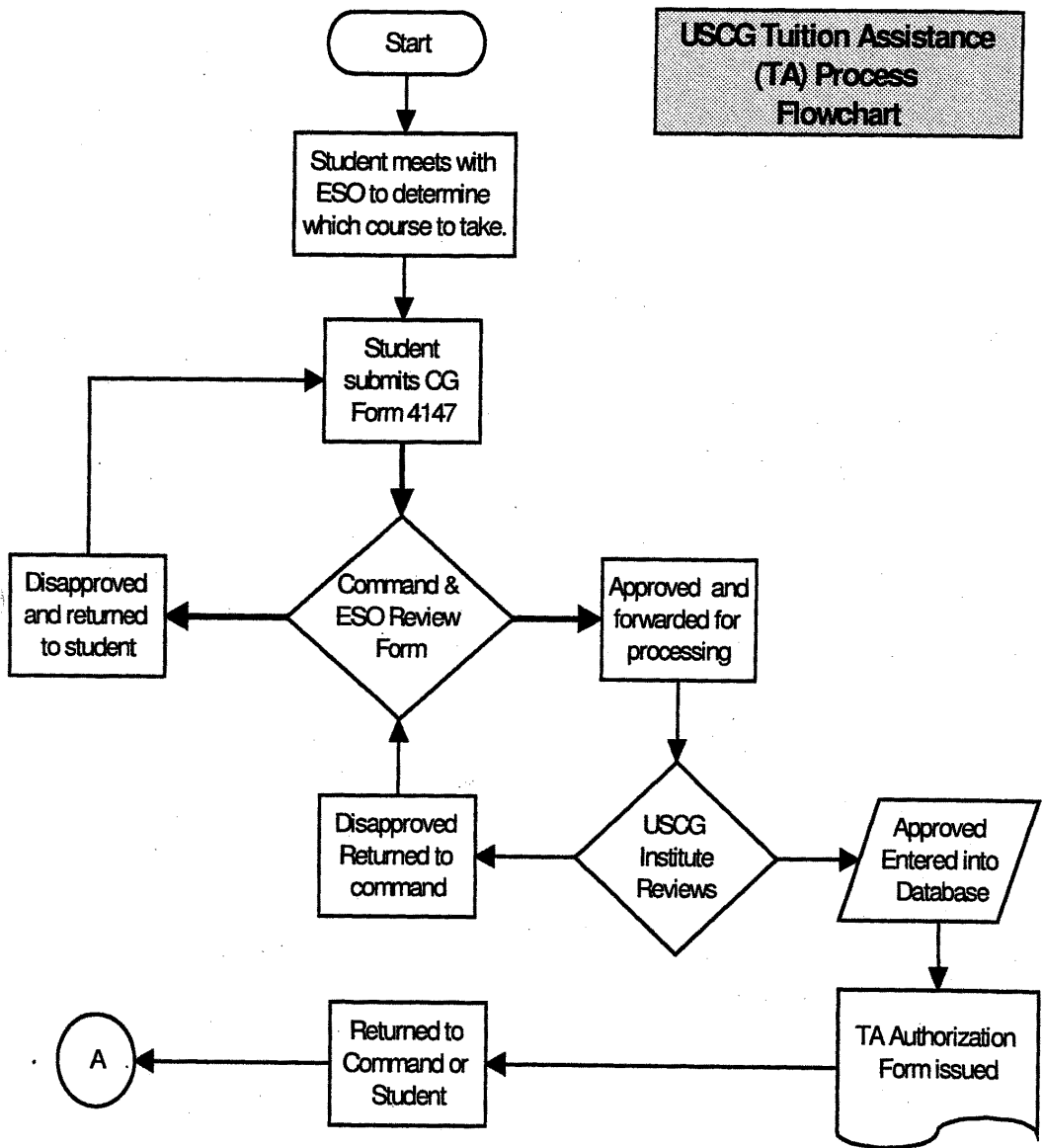
THE PURPOSE OF THIS FORM IS TO ADVISE THE STUDENT AND THE SCHOOL THAT THE COURSE (S) LISTED ABOVE IS APPROVED FOR PAYMENT AND THE PROCESS FOR INVOICING THE USCG. THE STUDENT IS TO TAKE THIS FORM TO THE SCHOOL.

THIS FORM IS TO BE RETURNED TO THE ADDRESS SHOWN BELOW IF IT IS CANCELED OR AMENDED IN ANY WAY. SHOW ACTION TAKEN ON THE RETURNED FORM. FAILURE TO DO SO MAY RESULT IN A COLLECTION ACTION AGAINST THE STUDENT, VIA THE COMMANDING OFFICER.

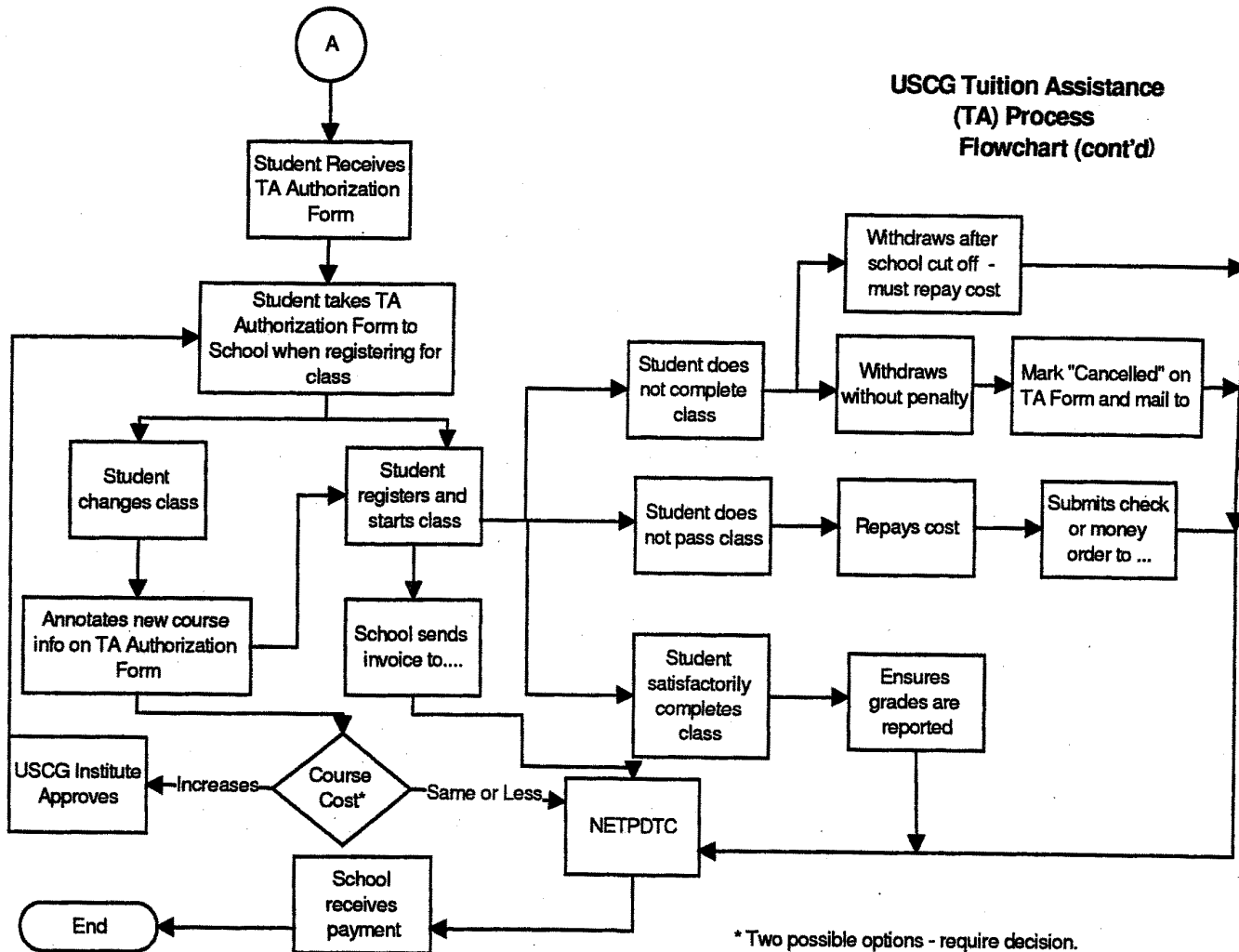
SCHOOLS SHOULD SEND INVOICES AND GRADES TO THE ADDRESS SHOWN BELOW:

COMMANDING OFFICER
NETPDTC N8115/COAST GUARD GROUP
6490 SAUFLEY FIELD ROAD
PENSACOLA FL 32509-5241

**USCG Tuition Assistance
(TA) Process
Flowchart**



**USCG Tuition Assistance
(TA) Process
Flowchart (cont'd)**



TA checklist

Application for Off-Duty Assistance

TUITION ASSISTANCE RESOLUTION/INDEBTEDNESS RESPONSE LETTER

From:

To: Commanding Officer, Naval Education and Training Professional Development and
Technology Center (N8115)

Subj: TUITION ASSISTANCE INDEBTEDNESS IN THE CASE OF

NAME _____ SSN _____

Ref: (a) TA Authorization Document Number _____

1. The following action has been taken to resolve the tuition assistance indebtedness incurred by reference (a):

- a. A money order in the amount of \$ _____ accompanies this document.
- b. A passing grade is submitted with this document.
- c. A waiver request approved by my Commanding Officer has been forwarded to the USCG Institute.

SIGNATURE